

## INTRODUCTION

Network Computing is reviewing the viability of outsourcing enterprise help desks. This feature story will include in-depth profiles on key companies defining the next generation of help desks. Profiles will be generated using a fictitious Request for Information (RFI) from Metropolitan Care, below. Returned RFIs will be analyzed and compared in our April 2, 2001 issue.

Your company has been selected for one of our profiles. To participate, you need to answer the questions that make up the Deliverables for the RFI. Answer all questions in light of your current services. If you wish to comment on the capabilities of future services, please do so but qualify them as future services and provide a time frame for their implementation. If a question is not relevant, please indicate that and tell us why it is not relevant.

## REQUEST FOR INFORMATION

### Schedule and Logistics

Incorporate the RFI Deliverables directly into this file. Each deliverable aims to provide you more information and collect facts and figures that you will need for the final deliverable and your proposed solution. You may include other materials supporting your answer, but attach them to this document or include them with your e-mail response. Note that a reference to a URL is not a sufficient answer.

If you have any questions, please contact the author:

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**Phone: 315-443-2577**

Please return this document and any supporting materials to Sean at the above e-mail address. We prefer an electronic response, however, RFIs can also be mailed to Sean's attention at

**Center for Science and Technology**  
**Room 4-206**  
**Syracuse University**  
**Syracuse NY 13244**

RFIs must be received via e-mail or US mail by 5 p.m. on January 8, 2001 to be included in the April 2, 2001 issue.

If you have any questions regarding the RFI, the deadline for submitting them is January 3. We will do everything possible to answer your questions within 48 hours of submission.

Company name: Seneca Corporation

Company contact: Dennis Bailey

Contact telephone number: 703.903.0226

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Submission date: 1/10/01

### Executive Summary

#### *Business*

Metropolitan Care (Metro) is a large medical center providing children's health care and research in neonatology, cardiology, hematology and oncology. It currently services 40% of the pediatric market. Metro's facilities include the Health Center, a 250-bed facility near the University, a community hospital in a suburban location, and 3 health clinics in the immediate, downtown area.

### *Vision*

Expand Metro services to include 60% of the pediatric market in the area and become a premier provider of children's health care information using knowledge bases and state-of-the-art deliver mechanisms.

### *Assumptions*

1. The benefits of recruiting, training, and retaining qualified help desk support personnel no longer outweigh the costs.
2. Scarce computer and network resources work on business and technology initiatives and not on computer maintenance and support.

### *Goals*

1. Direct source (outsource) Metro's Help Desk to reduce annual costs in supporting operating system software and application software.
2. Partner with a service provider that can grow with our business and provide future solutions to reduce overall costs in software support and hardware maintenance.

### **Metro Help Desk**

Metro's Help Desk (MHD) employs 15 FTE in support of 7,500 employees. MHD installs, configures, and supports operating systems and application software in 3 tiers:

Tier1	Initial call, problem identification, incident creation and tracking Triage calls/incidents to Metro network engineers or service contractors
Tier2	Telephone or E-mail support
Tier3	Hands-on support

MHD uses Remedy software and its Web-based interface for call tracking and incident reporting. It compiles an asset inventory of hardware and software in an SQL database and leverages an internal Web site to publish self-help documentation and frequently answered questions in Adobe Acrobat.

MHD is on-site 24x7 in the Health Center and 10x5 in the community hospital. There is no on-site support for the clinics. Users can report incidents to MHD via phone and e-mail. All calls are answered within 2 minutes; voice mail within 4 hours; e-mail within 2 hours. MHD has a 95% success rate in resolving problems at Tiers 2 and 3.

Metro employees work on either PCs or Macintoshes with standard configurations. 2700 PCs (HP Vectra, PII/III 266- 650 MHz 128MB RAM), 860 Macintoshes (Power Mac G3/G4 450 MHz 128 MB RAM), and 150 laptops (IBM Thinkpad 600e PII 128MB RAM) are deployed. These computers support a range of software that includes Windows 98/NT operating systems, MS-Office applications, Netscape Messenger, and Palm Desktop software. Metro also has clinical, diagnostic, and patient data warehoused in Oracle databases. Oracle user identifications and passwords are handled separate from Metro's NT Domain database and reserved for the medical staff, only.

Leased lines link the community hospital and clinics to the Health Center (T1, 256Kb, respectively). Hardware support and leased lines are maintained by outside service contracts that will come due in September 2001. Metro network engineers maintain clustered, NT Domain servers in a switched, gigabit environment located in the basement of the Health Center.

Metro has been implementing PeopleSoft products since 1998. Modules for Human Resources and Payroll are fully implemented using Oracle; Payables and Receivables are in progress. Metro plans to install 3,000 new PCs, 50 printers, and 10 laptops. There are no plans to install new Macintosh computers, however, support for the platform will continue.

### **Costs**

In 1999, MHD resolved 24,127 incidents (21,944 at Tier2; 2,183 at Tier3). The total cost of running MHD in 1999 was approximately \$1.19M. This included salaries and benefits for 10 FTE at Tiers 1 and 2

(\$437,500), for 5 FTE at Tier 3 (\$701,663) and training (\$50,000). With this, MHD's cost per incident at Tier 2 and 3 was **\$49.29**

Also in 1999, Metro paid outside contractors \$540,000 for PC, Macintosh, and printer support (approximately \$100 per CPU and \$75 per printer per year). These contractors resolved 1,623 reported hardware incidents. **Metro's hardware cost per device in 1999 was \$332.71.**

## DELIVERABLES

### Business Model Overview

Please describe the general business model(s) used to direct source help desks to the enterprise. This section should include the types of customers you support (small, medium, large, or carrier grade enterprises), the companies you partner with, the general commercial applications you support (e.g., PeopleSoft, Oracle), and your methodology to maintain cost-effectiveness while providing a high availability and high volume call center for help desk support?

Service response:

Seneca specializes in outsourced help desk solutions. We believe in providing personalized service as a means to furthering customer productivity. We accomplish this by providing targeted teams with overflow capacity of help desk professionals to provide the initial response. These help desk professionals are trained on and rated on the command of the institutional knowledge of an organization. They are supported by a team of technical consultants who are knowledgeable in the technology our clients' utilize. Calls flow from one group to another through live transfers, seamless to the customer. Our model is scaled to provide rapid response, handle large fluctuations in call volume, provide the customer with a consistent experience, and quickly get the customer to the most likely resolution point, in a cost effective manner.

As a help desk company, we are a Microsoft Certified Solution Provider. We support most commonly available shrink-wrapped software (e.g., Microsoft Office, Lotus Notes, etc.), as well as connectivity and usability questions for proprietary, or highly customized applications (e.g., PeopleSoft). Since we specialize in help desk, we partner with other organizations for depot and on-site hardware repair, and deskside assistance. We have, in the past, partnered with Comark and Integrated Systems Analysts (ISA) for similar efforts. This response targets ONLY outsourced help desk services, and not hardware repair or deskside assistance.

Companies are seeking new ways to reduce operating expenses, improve their core competencies and free up internal resources. Seneca is committed to developing a successful partnership with all of our outsourcing clients. We are committed to quality. We believe that a successful partnership begins with the selection of a vendor whose primary focus is helping the customer achieve their business objectives.

Metro is seeking an outsourcing partner to provide help desk support services for:

- 1) Reduce annual costs in supporting operating system software and application software.
- 2) Grow with Metro and providing future solutions to reduce overall costs in software support and hardware maintenance.

Metro's intention is to have a centralized help desk solution as a means of providing a higher level of customer service and reducing the technical support burden placed on its internal support staff. The focus of the Metro help desk will be to provide rapid and efficient technical support on desktop computer hardware, commercial applications and operating systems.

### Experience

How long have you been a direct source for help desk services?

Who are some of your largest clients?

What are your base qualifications for help desk staff and do you have a continuing education requirement?

Service response:

Seneca's corporate mission is to help our clients meet their business objective. We do this by providing the highest quality help desk and support operations management services available. Seneca has been successfully providing help desk support solutions to Fortune 500 companies and Government clients for over 8 years. We take the time to develop a good understanding of your environment, business issues, and what it takes to make Metro callers very satisfied customers.

Seneca's sole business focus and core competency is help desk services and management. Some of our clients include:

- Zurich Kemper
- Xerox
- Smithsonian Institute
- Department of the Navy
- National Institutes of Health
- State of New Hampshire
- US National Guard Bureau

Seneca takes great pride in our methods for attracting and retaining employees for the help desk operations. Each employee takes a technical evaluation designed to determine if they have adequate troubleshooting skills to solve client calls placed to the help desk. Employees participate in weekly high-impact training sessions designed to keep all Seneca employees up to date on client-specific problems and program changes.

Help Desk employees are provided with performance feedback on a weekly basis. This feedback is designed to show employees how they are performing against established goals for their position. The feedback is created from data collected from the Automatic Call Distributor (ACD), CMS, ticket documentation and call monitoring. In addition, each team member receives feedback on the overall performance of the help desk including technical response time, abandoned rates, first call resolution and live transfer rates. This performance feedback is a critical element in Seneca's ability to meet our client's service level agreements.

### **Support Coverage**

Does your service include on-site installation, setup, and configuration of operating systems and application software?

Do you maintain asset inventories of hardware and software? If so, what software application is used?

Do you provide end users with hands-on, video, or Web-based training?

Service response:

At present, Seneca's service does not include on-site installation, setup, and configuration of operating systems and application software. In addition, Seneca does not maintain asset inventories of hardware and software and end users are not provided with hands-on, video or web-based training.

In the interest of providing our clients with the best in customer care, Seneca does and can partner with other companies that provide the services listed above. These "best-in-class" partnerships can be formed using a vendor of either Metro's or Seneca's choosing.

### **Application Support**

Please indicate which Metro applications you support.

- Macintosh System 6x and above
- McAfee Anti-virus
- Netscape
- Office 4.2 and above

- Reflection
- Word Perfect for the Mac
- Palm OS and Desktop
- PeopleSoft
- Print spooler
- Windows 98 Second Ed
- Windows NT 4
- Windows 2000 Pro
- Adobe Acrobat
- McAfee Anti-virus software
- MS-Office 95, 97
- MS-Office 2000
- Netscape Navigator 4x and above
- Netscape Communicator 4.51 and above
- Oracle 8i client
- Reflection

In addition to the above, please indicate what other operating systems, desktop applications, and Internet applications you support. If necessary, include a separate document.

Do you support account management such as create, delete, modify, and change passwords for NT Domains, Active Directory, and/or Novell Directory Services.

Service response:

Seneca can provide Metro with application support for all the applications that are listed above. Our approach to providing high quality, professional help desk services and management focuses on Metro--the customer. We have the people, processes and systems to provide the highest level of phone-based support to your customers. Our process involves a comprehensive implementation plan during which we work with you to learn as much about your environment to enable us to provide the best support. This information is then used to train our Help Desk Professionals and Technical Consultants, and to populate our systems. When the first call arrives, we already know your environment, and often have information on the caller accessible at our fingertips.

Account management functions such as create, delete, modify, and change passwords for NT Domains, Active Directory, and/or Novell Directory Services can be supported by Seneca. We are currently providing Novell Directory Services to the New Hampshire Department of Health and Human Services (DHHS).

### **Delivery Mechanisms**

Will you come on site to determine the size and scope of help desk requirements?

Do you provide the necessary tools like integrated voice and data applications and remote control applications for the call center?

\* Do you implement a form of knowledge management (KM) to support your service? If so, please describe a KM solution you have provided to a customer?

Service response:

Seneca will perform all tasks required for the successful implementation of the outsourced help desk services and systems. Labor and professional services will be billed on a T&M basis for the time actually used. Metro will pay for all travel related expenses associated with the setup and configuration of the outsourced Metro help desk. Metro will also be responsible for any training expenses of Seneca personnel for unique or proprietary support issues.

Currently, Seneca does not integrated voice applications. This is a feature that we are actively exploring and will be moving to in the near future. For remote control applications, we are exploring web based solutions such as desktop streaming to be implemented in the near future.

A knowledgebase is engaged and utilized from the moment a call record is initiated. This knowledgebase will be populated with industry-standard, pre-packaged knowledge on Metro's standard applications, Metro-developed technical support information, and Seneca-customized processes (developed in over eight years of providing enterprise help desk services). This knowledgebase will also be available to the Metro end user community in the form of 'self-service', web-based support.

DHHS is a current customer in which we are providing knowledge management support. We have integrated there existing documentation into our beCyber CSS call management system. The knowledge base has been developed using DHHS' existing documentation with documentation developed by Seneca.

### **Terms & Conditions**

MHD's Service Level Agreement (SLA) includes the following conditions. Please indicate whether your solution could meet the requirement by placing a check next to it.

- Answer all phone calls within 2 minutes.
- Respond to all voicemails within 4 hours
- Respond to all E-mails within 2 hours
- Schedule on-site visits for supported software within 5 days
- Triage high priority calls to Metro engineers or service contractors within 10 min.
- Triage normal priority calls to Metro engineers or service contractors within 30 min.
- Track all triaged calls to engineers and contractors

\* If you have other suggestions for SLA provisions that would improve service, please detail them.

Do you define and implement escalation procedures between traditional help desk tiers 1, 2, and 3? If so, can you provide us with a working definition and implementation?

Service response:

Seneca's Service Level Management Methodology has evolved over our eight years in the help desk industry. Our Service Level Management is based on the best industry practices and knowledge. It is driven by detailed Service Level Agreements (SLAs) and escalation procedures **developed in the implementation phase**. Each SLA and escalation is uniquely defined and all personnel supporting Metro will be trained on the SLAs and escalation procedures utilized in the Metro environment.

Each request to the help desk will be classified by the severity, or the business impact of the request, using a customized priority structure within beCyber CSS. The priority maps back to timed Service Level commitments (response and resolution). beCyber CSS then automatically tracks Service Level compliance, sending automated notifications to the responsible resolving parties proactively, and a management or technical escalation when the service level event is exceeded. Compliance with Service Level Management is tracked, reported to Metro's, and will utilized in performance measurement (reviews) of Metro's help desk staff.

Another aspect of our unique approach is the use of Help Desk Professionals (HDPs) to triage each inbound request for support. The HDPs answer each call with the appropriate greeting to maintain transparency with your company or support organization, gather the information you need, determine the caller's needs and then route the call to the most qualified resource available. This may be one of our local or remote technical support experts, a third party provider (e.g. break/fix services), or your internal support staff (e.g. LAN Administration). All of this is accomplished and tracked through Seneca's Call Management System (CMS). Metro's initial response will include:

- Initial response and call screening for all customer calls.

- All calls coming into the help desk being answered in the Metro name.
- Gathering all the information Metro requires for every call and logging it into the Seneca Call Management System.
- Transferring calls via the Seneca CMS to the appropriate resource for closing the calls as determined by Metro. The responsible groups include Seneca technical consultants, the Metro internal help desk, or third party provider.
- When necessary, following up with callers to determine status of call resolution.

### **Systematic Quality Assurance**

Can you provide Metro with the following statistics at regular intervals?

- Total calls or incidents reported: Hardware and software
- Response Times
- Call durations
- Open call queue status
- Hold queue status
- Average mean time to resolution for all incidents

What software do you use for problem identification and call tracking?

Do you provide customized, monthly management reports? If so, can management obtain live reports from a Web-based reporting tool?

Service response:

Seneca utilizes a proprietary, custom-developed call management system, beCyber CSS. beCyber CSS was designed to allow a high degree of customization, to meet our different client's information gathering needs, while still preserving the benefit of economies of scale. beCyber CSS offers industry-strength capability, with a full-featured web interface, including ad-hoc reporting capabilities.

beCyber CSS was developed in Cold Fusion built on top of a Microsoft SQLServer 7.0 back end database, providing industry-strength performance and integration capabilities. A full-featured web interface, provides secure access to all support activity and real-time OLAP and ad-hoc reporting. All component systems (application server, web server, database server) are NT-based, secured in Seneca's systems facility, and regularly backed up to offsite archives. The database server is mirrored at 15-minute intervals.

Functions of beCyber CSS include:

- Login based data compartmentalization (e.g., Metro would only be able to view Metro data, and no other client would be able to view Metro's data)
- Call logging and tracking
- Client-specific hierarchical call classification for trend analysis
- Customized, flexible customer profiles
- Call routing and dispatch, utilizing email or alpha-page
- Service Level Management tracking by user, product and priority, including proactive and fault notifications to management and technical escalation paths
- Business hour or 24 hour response and resolution time tracking
- User and problem history analysis

- Warranty and software license tracking
- Simple and complex querying against all tables
- Web-based, canned, and ad-hoc reporting against all tables for access to client management personnel
- Integrated Customer Satisfaction Measurement and Reporting
- Complete audit trail of all database activity

### **Integration**

Do you support customized application support for PeopleSoft, Enterprise Resource Planning or Customer Resource Management?

Do you provide consulting services in knowledge bases and delivery mechanisms that will support Metro's's vision?

Service response:

Seneca's support personnel would work with Metro's staff to identify the support requirements for PeopleSoft, ERP and CRM systems. We recognize that not all of our clients have the same support requirements, therefore, each requirement is unique. Our program management professionals will assist Metro staff to develop customized feature sets for Metro and work to train Seneca's support staff appropriately.

Consulting services in knowledge bases and delivery can be provided by Seneca on a time and materials basis. Our expertise is in Help Desk Services and development of knowledge bases is an integral part of customer relationship management. Many employees like to be self-sufficient and having information available to them aids in helping to make trouble resolution more efficient.

### **Implementation**

Will you assign a dedicated account representative to Metro's?

Can end users at Metro's begin receiving services 30 days after a signed contract?

Service response:

The implementation process centers on the people, processes and systems required to deliver world-class support to Metro. To assist with the implementation, monitoring and maintenance of the contract established between Metro and Seneca, a program manager will be assigned to Metro. The program manager will serve as a direct link between Metro and the outsourced Metro help desk.

Seneca's program manager and operations staff will work with Metro to develop a customized process from initiation of a support request to resolution, for every type of request. This includes severity classification and problem categorization to ensure that business essential issues are responded to quickly, and that you have the strategic support data Metro needs to make IT business decisions.

Although several activities are involved, the entire implementation can be accomplished in approximately four to six weeks from contract signing. Seneca will hold an implementation kickoff meeting with Metro, set up a more detailed timeline, and develop an internal marketing approach. We will continue to work with Metro throughout the implementation process, and provide weekly status reports on the implementation as the internal marketing is being delivered. All of this guarantees that when the service turns on, Metro internal customers are already being supported by a team that knows your environment, and the support processes surrounding it.

### **Cost**

**Please note that cost information is vital to our research. If you foresee a problem with this, please contact Sean Doherty (315-443-2577, sdoherty@nwc.com) as soon as possible.**

How will you charge Metro's?

\$9.75 per user per month\_ Fixed monthly cost per user (6,000 users)

\$14.00 per platform per month\_ Fixed monthly cost per platform (4,250 platforms)

N/A\_\_ Annual subscription

Blocks of 2500 calls at \$19.00 per call\_\_ Prepaid call packs

N/A\_\_ Other volume pricing call packages (please detail below)

Based on MHD's 1999 call reports, can you estimate the cost per incident using your services?

MHD's cost per incident would be \$27.26.

What would you estimate the annual cost to source help desk support to Metro's?

The annual cost estimate to source help desk support to Metro would be \$702, 000.

**\*\*NOTE:**

**Costs are for phone support only**

**Pricing does not include asset inventory**

**No on site work (provided through partnership, cost not included in quote)**

**Metro's's Next Generation Help Desk**

In 250-300 words or less, please outline your solution for Metro's's Next Generation Help Desk. Your solution should incorporate and summarize answers provided above and include a cost-benefit analysis in terms of annual costs and cost per incident along with the service levels that you provide at each Tier (1,2,3). You may use your own definitions for layered support and are not restricted to MHD's tiers.

In addition, this section can include other services and/or consultation you can provide Metro's? For example, are you equipped to compete with our hardware and network service contracts coming due in September 2001? If so, what will be the annual cost and cost per CPU or other device? Do you have the resources to help us build knowledge bases of clinical information to deliver using Customer Relations Management (CRM)?

**Service Response**

Seneca specializes in providing customized help desk solutions to our clients. Our flexibility and customization enables us to seamlessly integrate within Metro's support model. We do this by working with you to assess your current environment, bringing industry best practices to develop Metro specific help desk processes, which we then map to Metro's support processes. This is further enhanced by the use of Seneca's highly customizable and proprietary call management system, beCyber CSS, which includes a full-featured web interface (including ad-hoc reporting), and drives Seneca's knowledgebase platform. beCyber CSS will be used to track and manage all support activity. Further capabilities of beCyber CSS include integration between third party systems and services to provide even greater enhancements to the support model.

The help desk is the focal point for all customer activity and serves as the logical repository for all support activities. Every customer interaction falls under the umbrella of case management, ensuring 'high touch' service delivery. The customer may contact the help desk by a variety of means, including telephone, web, and email, to initiate a support incident. Using beCyber CSS, the help desk tracks every support incident to resolution. The help desk provides primary problem resolution, and should the support incident require escalation outside of the help desk, escalation and service level management through a case manager. The Case Manager will follow each call through to resolution, ensuring that the customer is satisfied with the result.

The help desk could also play a large role in rollouts and deployments. With the help desk's involvement at the early stages of new product rollouts, and through targeted training, the help desk can also ease the difficulty of the change caused by the rollout.

As the help desk provides, documents and tracks service incidents to resolution, a data repository (located in beCyber CSS) will be developed. This data repository is used to populate the knowledgebase, ensuring knowledge retention. Analyzing data sets can provide trend analysis, fault management and recommendations for future rollouts and deployments. beCyber CSS's web-based reporting allows high level, real-time and drill down reporting to ensure that the data repository provides strategic value. Seneca's knowledge management expertise may also be used to consult with and assist Metro with their CRM needs.

The focus of the Metro Help Desk will be to provide problem resolution for all desktop computing support issues, including hardware, operating system, and commercially available application software. The Metro Help Desk will assume ownership of all calls, and when necessary, for calls involving Metro proprietary software, escalation into the Metro's internal resources. Calls requiring a deskside visit by a hardware or desktop technician will be dispatched directly from the Metro Help Desk.

Seneca offers a call answer rate of 90% of all calls within 30 seconds, with less than a 5% abandoned rate. We will resolve 75% of all application and OS calls during the first call, 90% within 1 business day, 98% within 2 business days. Any calls that require escalation will be escalated within an average of 15 minutes. On a monthly basis, Seneca will provide an independent contractor randomly generated customer satisfaction surveys based on 10% of the callers. These surveys consist of four targeted questions on customer service, responsiveness, knowledge and communication, as well as an overall rating, on a scale of one to five. Seneca commits to achieving >90% customer satisfaction as measured by these surveys.

Seneca has an eight-year track record of successfully providing our customers with support services identical to those requested under Metro's Next Generation Help Desk RFI. Our client base of very satisfied, major commercial and government clients is a testament to our commitment to the success of our clients. Additionally, given that our business focus is exclusively help desk, we have had extensive experience in teaming relationships to meet all of Metro's support needs.